

Completing the Project Plan

 Project IQ

 Project Manager

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.


Please note the Job Aid for [Completing the Project Plan](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.


- Lab Exercise 1.** Update Key Dates
- Lab Exercise 2.** Update Deliverables
- Lab Exercise 3.** Define the Financial Forecast




1. Update Key Dates


Set A


Name	Currency Exchange Capability Available
Date	Update the date to reflect the current schedule from the date picker 
Description	The ability to accept foreign currency seamlessly in our sales application
Status	◆ High Risk


Name	Financial True-up
Date	Update the date to reflect the current schedule from the date picker 
Description	Semi-annual financial review and reallocation of portfolio finances
Status	▲ At Risk

Name	Improved Employee Morales
Date	Update the date to reflect the current schedule from the date picker 
Description	Measurable improvement to employee morale
Status	◆ High Risk

Set B

Name	Employee Survey
Date	Update the date to reflect the current schedule from the date picker 
Description	Initial draft of employee survey of new projects
Status	▲ At Risk

Name	Realized Revenue
Date	Update the date to reflect the current schedule from the date picker 
Description	Forecasted revenue from the Driver Awareness Program realized
Status	◆ High Risk

Name	Quarterly Revenue Review
Date	Update the date to reflect the current schedule from the date picker 
Description	Review ROI across the portfolio




Status


▲ At Risk




2. Update Deliverables


Set A


Name	Vendor Onboarding Packet
Description	Complete packet of forms, agreements, policies, and procedures
Due Date	Update the date to reflect the current schedule from the date picker 
Status	In Progress
Progress Update	The materials for the packet are in progress

Name	Office Furniture Installed
Description	All office furniture and equipment installed at Chicago Campus
Due Date	Update the date to reflect the current schedule from the date picker 
Status	In Progress
Progress Update	Vendor assures us that that the furniture will be delivered on time

Name	Swag Bag
Description	Vendors are contributing items to give to our employees
Due Date	Update the date to reflect the current schedule from the date picker 
Status	In Progress
Progress Update	We have finalized our vendor list and sent initial requests

Set B

Name	Mobile App Requirements Document
Description	Maintain a document of the requirements for audit purposes
Due Date	Update the date to reflect the current schedule from the date picker 
Status	In Progress
Progress Update	We are just beginning the process

Name	Meeting Handouts
Description	A packet consisting of the meeting schedule, session agendas, and other event details
Due Date	Update the date to reflect the current schedule from the date picker 



Status

Completed

Progress Update

Meeting hand-outs have been printed and distributed

Name

Analysis Report of the Current HW, SW, and Comm

Description

Complete analysis to determine what new features will be required

Due Date

Update the date to reflect the current schedule from the date picker 

Status

In Progress

Progress Update

Expect to begin as planned in project



3. Define the Financial Forecast

Set A – Hardware Budget

Name	Big Routers
Financial Category	Select from the list 🔍
Amount to Distribute	\$10,000
Start Date	Select August of the current year from the date picker 📅
Number of Months	3

Name	Hardware
Financial Category	Select from the list 🔍
Amount to Distribute	\$30,000
Start Date	Select November of the current year from the date picker 📅
Number of Months	12


Name	Team Servers
Financial Category	Select from the list 🔍

Amount to Distribute	\$20,000
Start Date	Select current month of the current year from the date picker 📅
Number of Months	Each remaining month of the current year.

Set A – Labour Budget

Name	Labour Expense
Financial Category	Select from the list 🔍
Amount to Distribute	\$105,000




Start Date Select August of the current year from the date picker 


Number of Months 3

Set B – Software Budget

Name Licenses


Financial Category Select from the list 

Amount to Distribute \$30,000


Start Date Select August of the current year from the date picker 

Number of Months 3

Name Ongoing Costs

Financial Category Select from the list 


Amount to Distribute \$90,000

Start Date Select November of the current year from the date picker 


Number of Months 3

Set B – Travel Budget

Name Travel Expense

Financial Category Select from the list 

Amount to Distribute \$35,000

Start Date Select August of the current year from the date picker 

Number of Months 3